

# **EXHIBIT 1**

WestGroup Research

*Television Viewing Habits of Hispanic Adults in Phoenix, Arizona*



# Television Viewing Habits of Hispanic Adults in Phoenix, Arizona

Prepared for

NBC/Telemundo

and

Morrison & Foerster, LLC

November 19, 2004

**WestGroup Research**  
*Answers*









*(Click here to continue)*





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# Background/Methodology

- Telephone survey of 500 Phoenix-area adults; potential respondents screened to interview only those of Hispanic/Latino descent, and where Spanish is spoken at least half the time in the household.
- Individual respondents were randomly chosen from a sample of Phoenix area telephone numbers.
- Surveys were completed during October and November, 2004.
- Margin of error for study is +/- 4.4% at 95% confidence level.
- A copy of the questionnaire used is attached to this report as Appendix A.
- Research conducted by WestGroup Research, Phoenix Arizona. Contact Dave Maddox, Senior Analyst, with questions regarding this study.

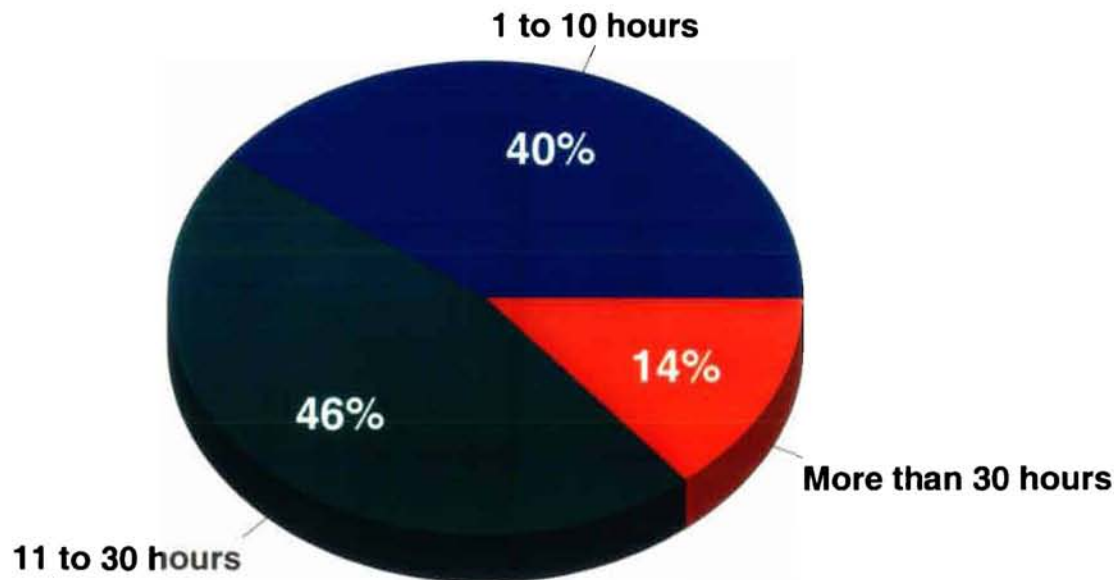


## Summary of Findings

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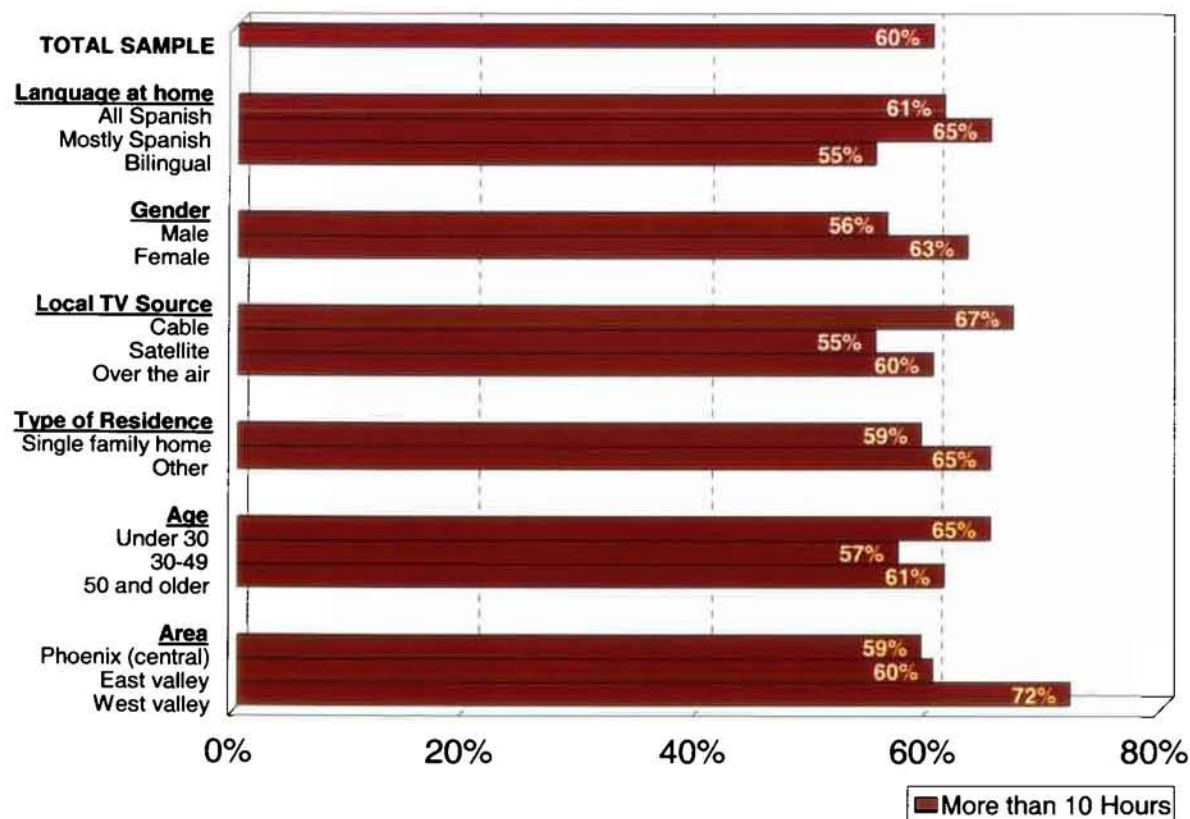
# Average Weekly Television Viewing



- 40% of the sample reported watching television an average of 10 hours or less per week.
- Another 46% watch between 11 and 30 hours of television per week, and the balance (14%) reported watching in excess of 30 hours per week.

*'In an average week, about how many hours do you spend watching television, including weekdays and weekends?'*

# Television Viewing by Demographic Segment

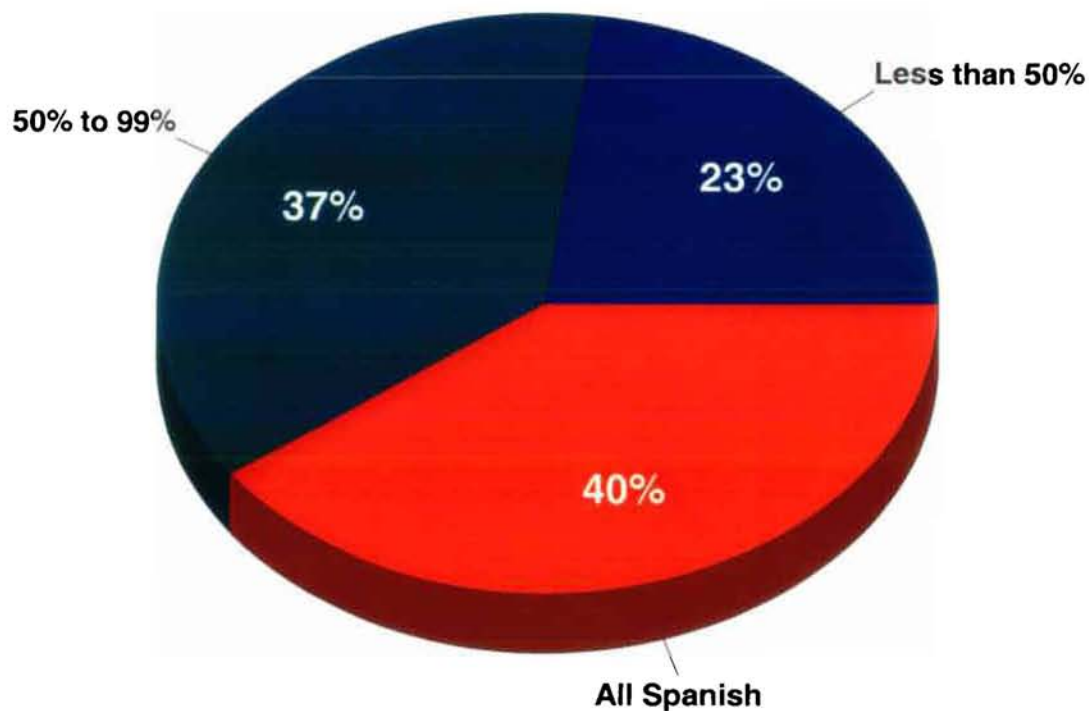


Percent of each segment watching more than 10 hours of television per week

- Spanish-dominant households were slightly more likely than bilingual households to watch more than 10 hours of TV per week.
- Highest overall viewership is seen among those living in the West valley of Phoenix (72% watch more than 10 hours).
- Women reported watching more television than men, and those with cable TV also reported watching more than did those with other methods of receiving programming.



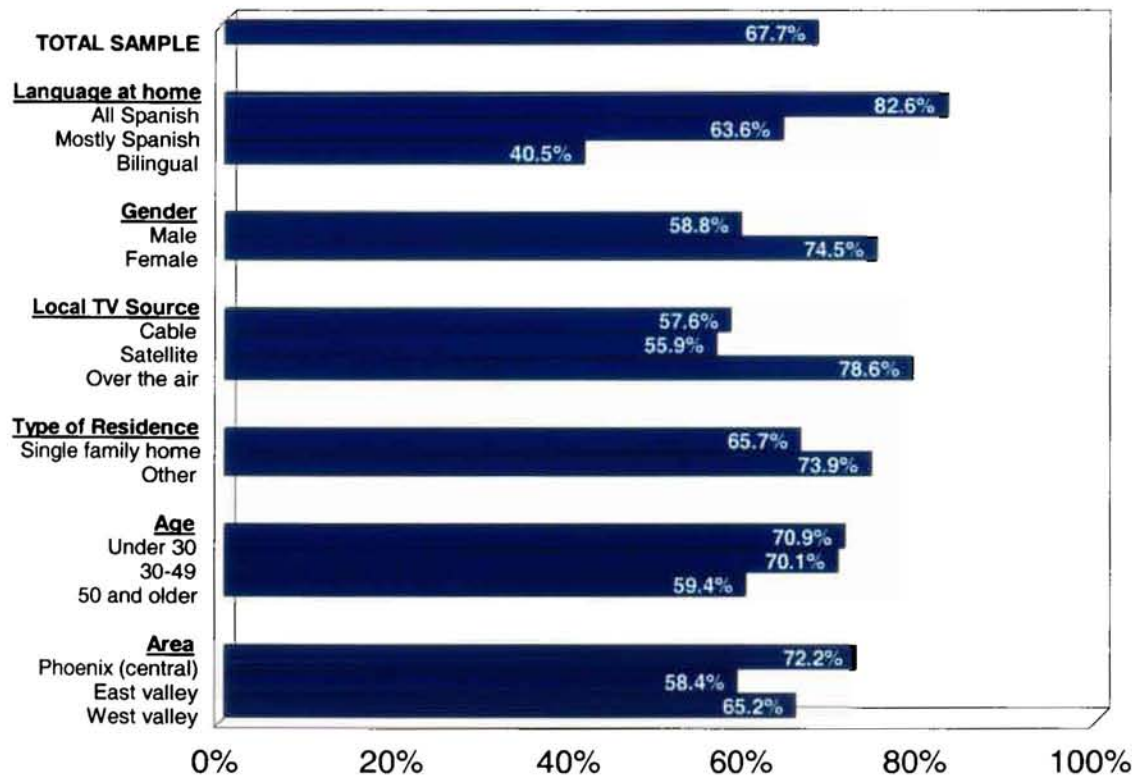
# Spanish Language TV Viewing



- 40% of those surveyed reported that all their television viewing was comprised of Spanish-language programming.
- 23% reported that Spanish-language programming made up less than half of their TV viewing.

*'What percentage of your television viewing is spent watching programming in Spanish?'*

# Spanish-Language Proportion of TV Viewing by Demographic Segment

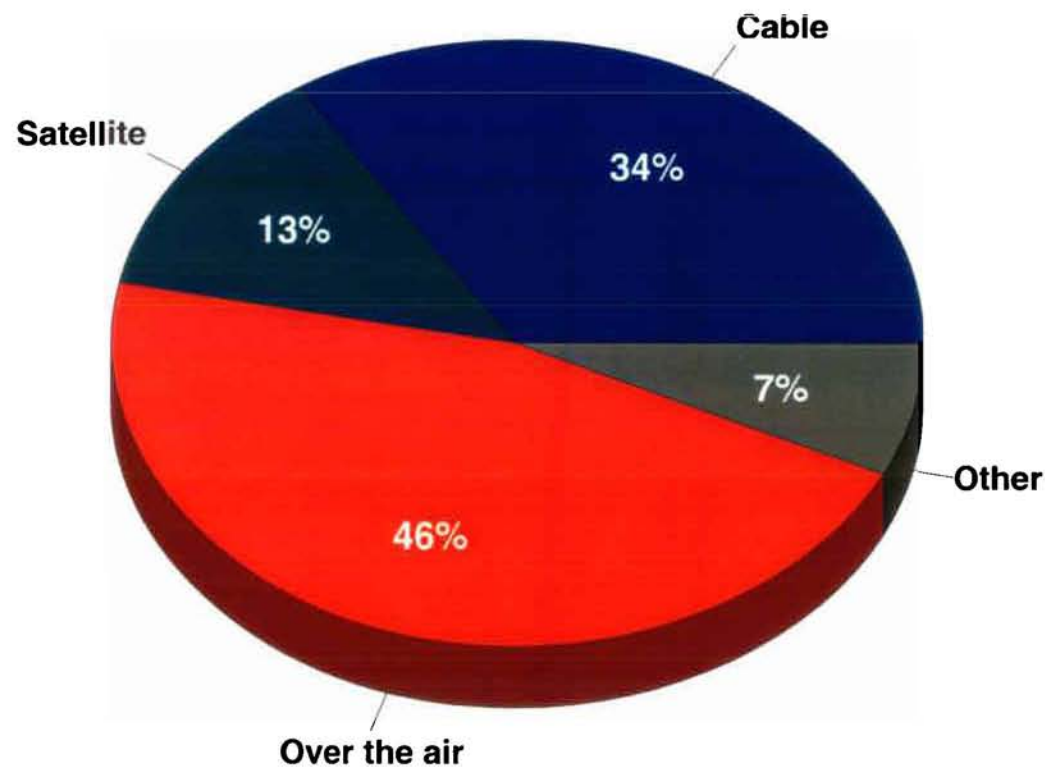


'What percentage of your television viewing is spent watching programming in Spanish?'  
(Average percentage by demographic segment)

- The highest reported percentage of Spanish-language viewing is, not surprisingly, among those who report that All Spanish is usually spoken in the household.
- Other groups with above-average proportions of Spanish viewing include those receiving local channels via 'over-the-air' method (78.6%), women (74.5%) and those living in an apartment or other non-single family residence (73.9%)



# Source for Local Television Programming

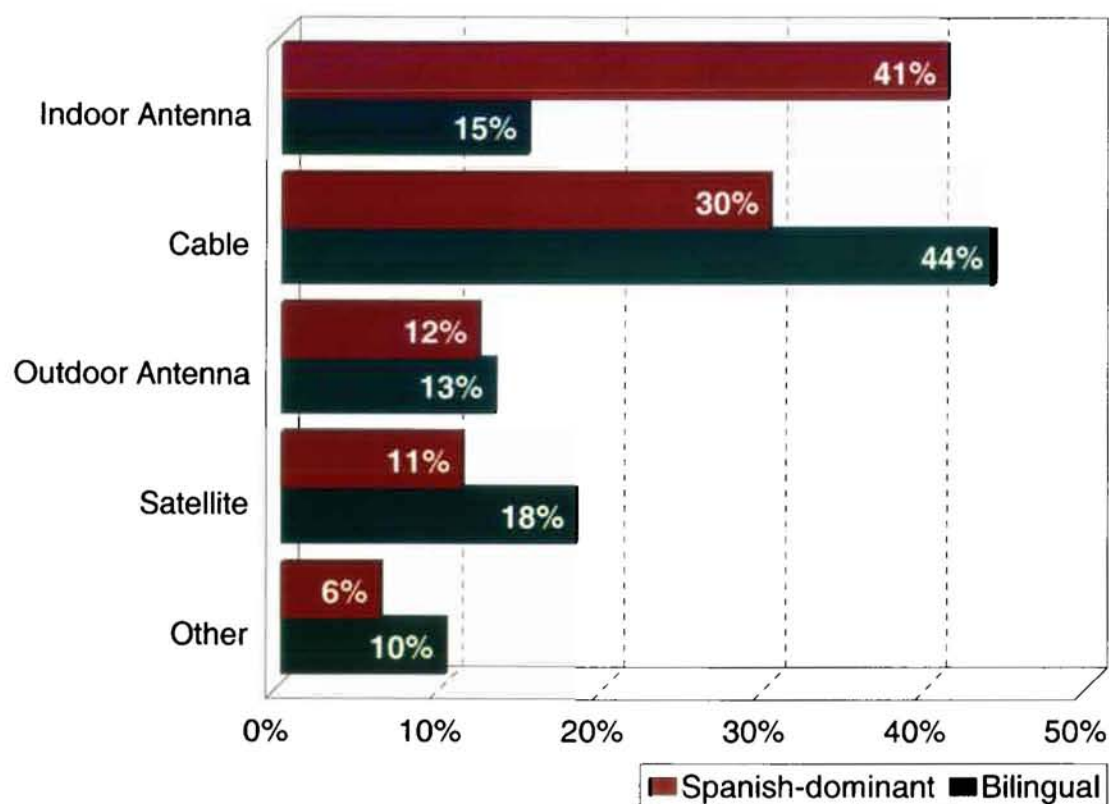


- 46% of those surveyed receive their local television programming via over-the-air broadcasts.
- 34% receive local programming via cable, and 13% via Satellite feed.

*'Which of the following best describes how you receive your local television programming?'*



# Local TV Source by Language(s) Spoken in Home

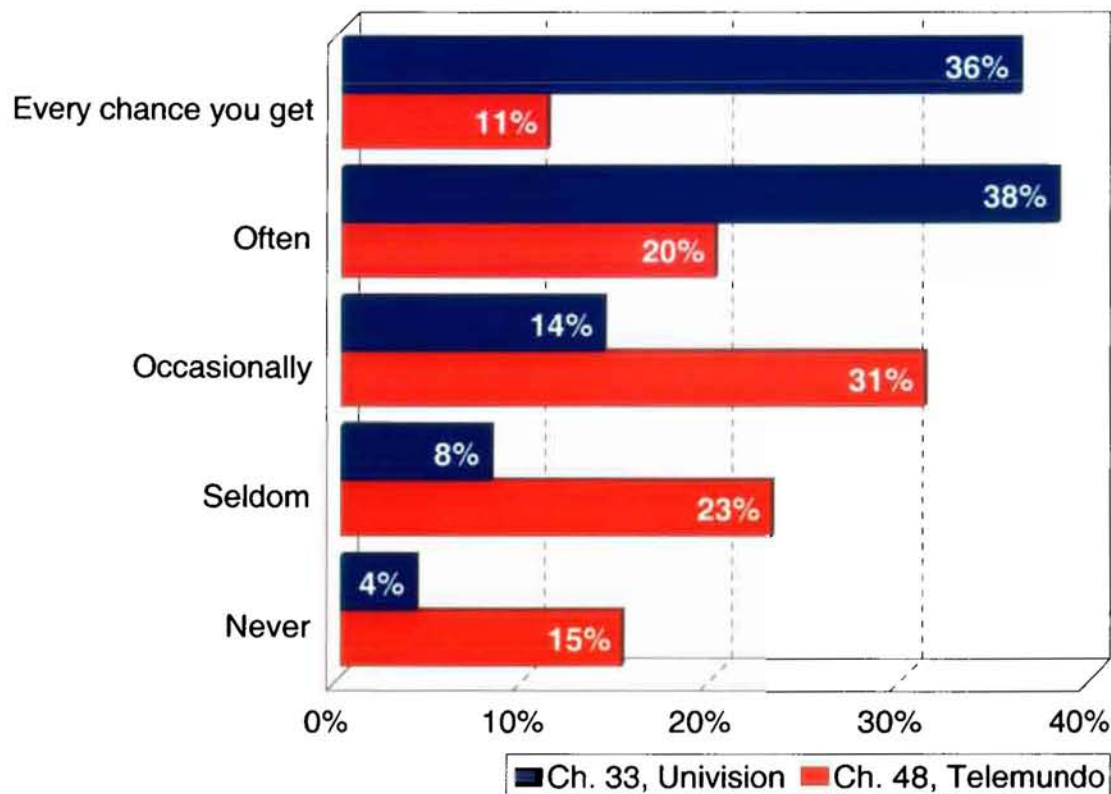


Percent of Spanish-dominant and Bilingual households receiving local programming via each source.

- Spanish-dominant households are much more likely to receive local programming by over-the-air sources, compared to bilingual households.
- Although the percentage of households using outdoor antennas is similar for both groups, 41% of Spanish-dominant households receive programming through an indoor antenna, compared to just 15% for bilingual households.
- Spanish-dominant households are also less likely to receive programs via cable or satellite methods.



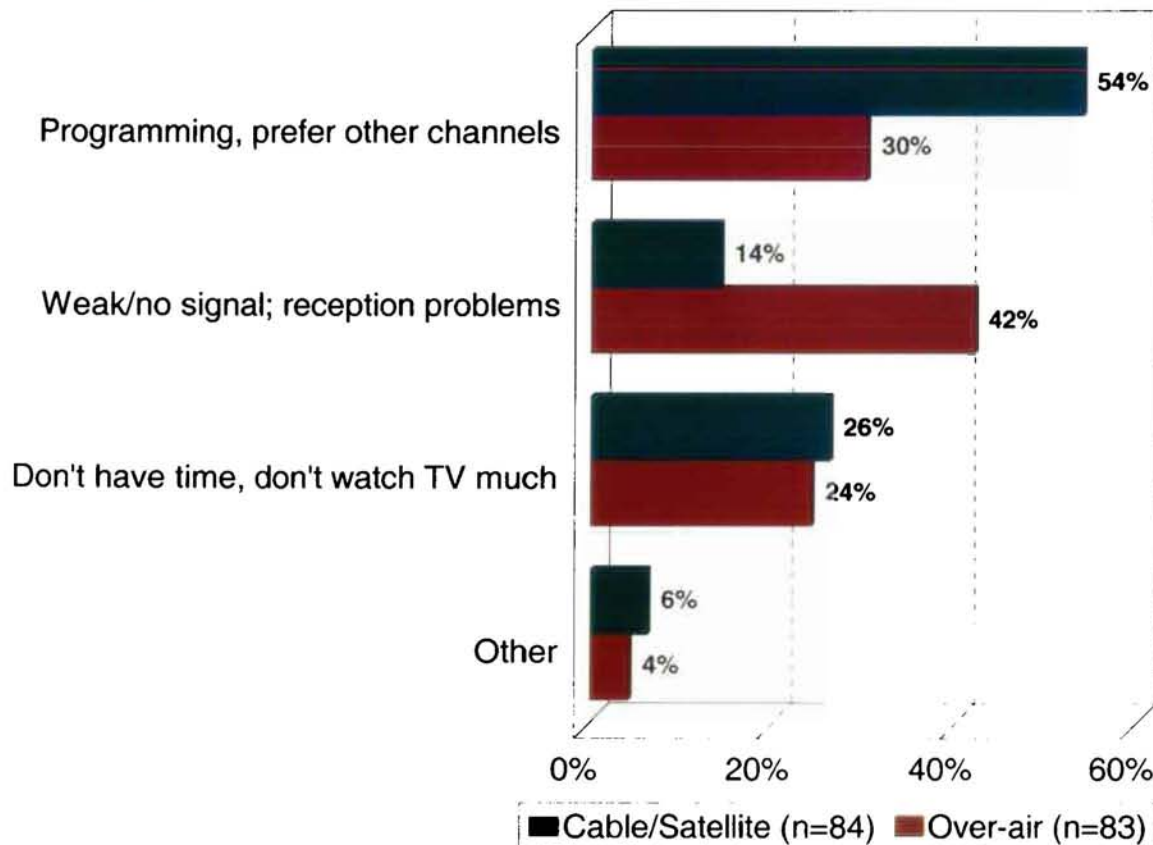
# Frequency of Watching Local Spanish-Language Stations



- Respondents are much more likely to report watching Channel 33 (Univision), compared to Channel 48 (Telemundo). 76% of the sample reported watching Channel 33 at least 'Often', compared to only 31% for Channel 48.

'How often do you watch (Channel 33, Univision/Channel 48, Telemundo)?'

# Reasons for Not Watching Channel 48 More Often

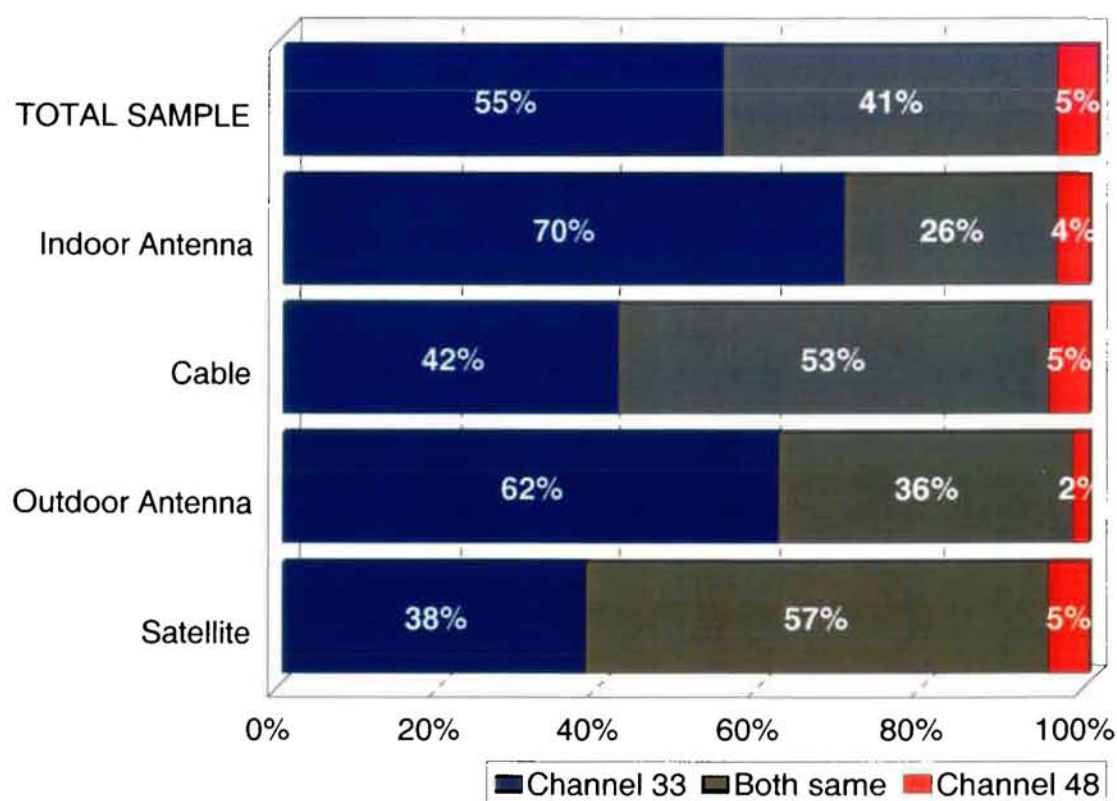


- Although cable and satellite users cited programming preferences as reasons why they do not watch Channel 48 more often, those respondents with antennas were more likely to cite signal or reception problems as reasons for not watching Channel 48.

'Why don't you watch Channel 48 more often?' (Among those who 'seldom' or 'never' watch Channel 48)



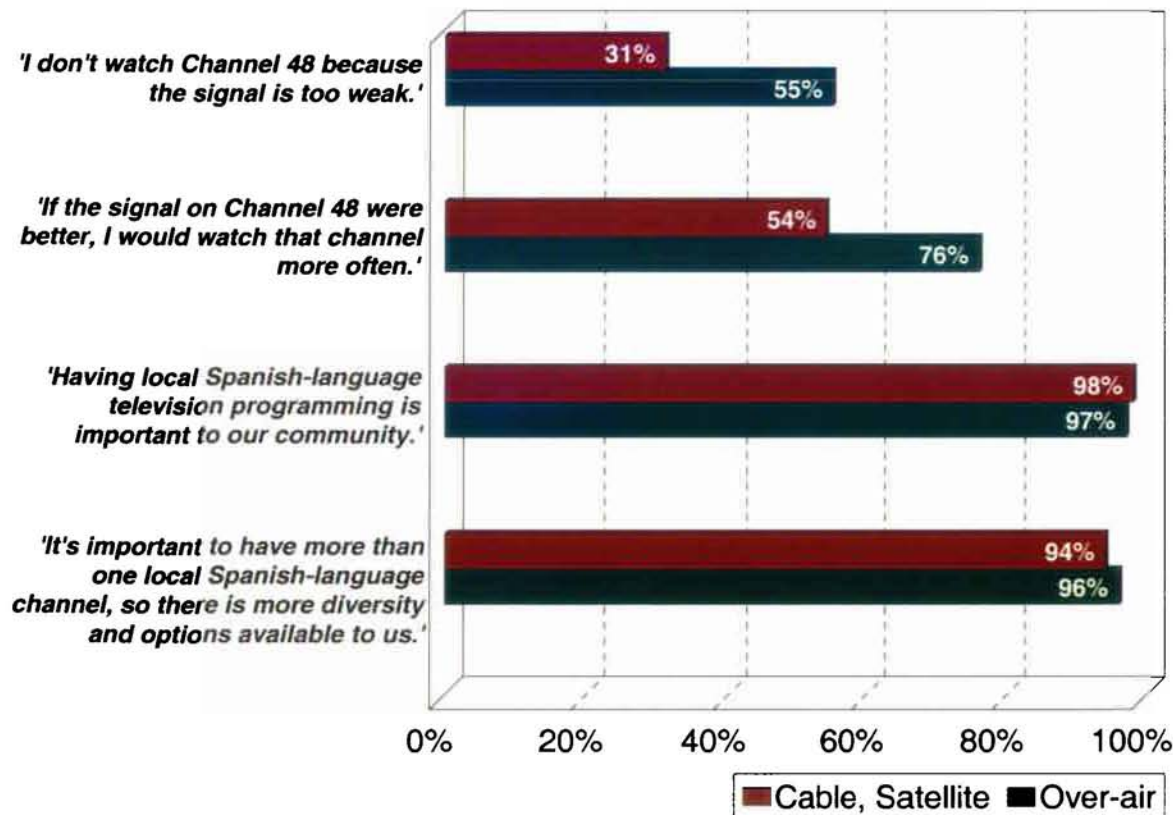
# Local Channel Reception Quality by Source of Local Programming



*'In your opinion, on which channel do you receive better reception?'*

- Respondents were asked to state whether they usually receive better reception on Channel 33 or Channel 48. For the total sample, reported reception is better on Channel 33 by an 11 to 1 ratio.
- Among those using antennas for local reception, the disparity is much greater, with Channel 33 being reported stronger by more than a 20 to 1 ratio.

# Agreement with Various Statements re: Local Spanish TV programming.

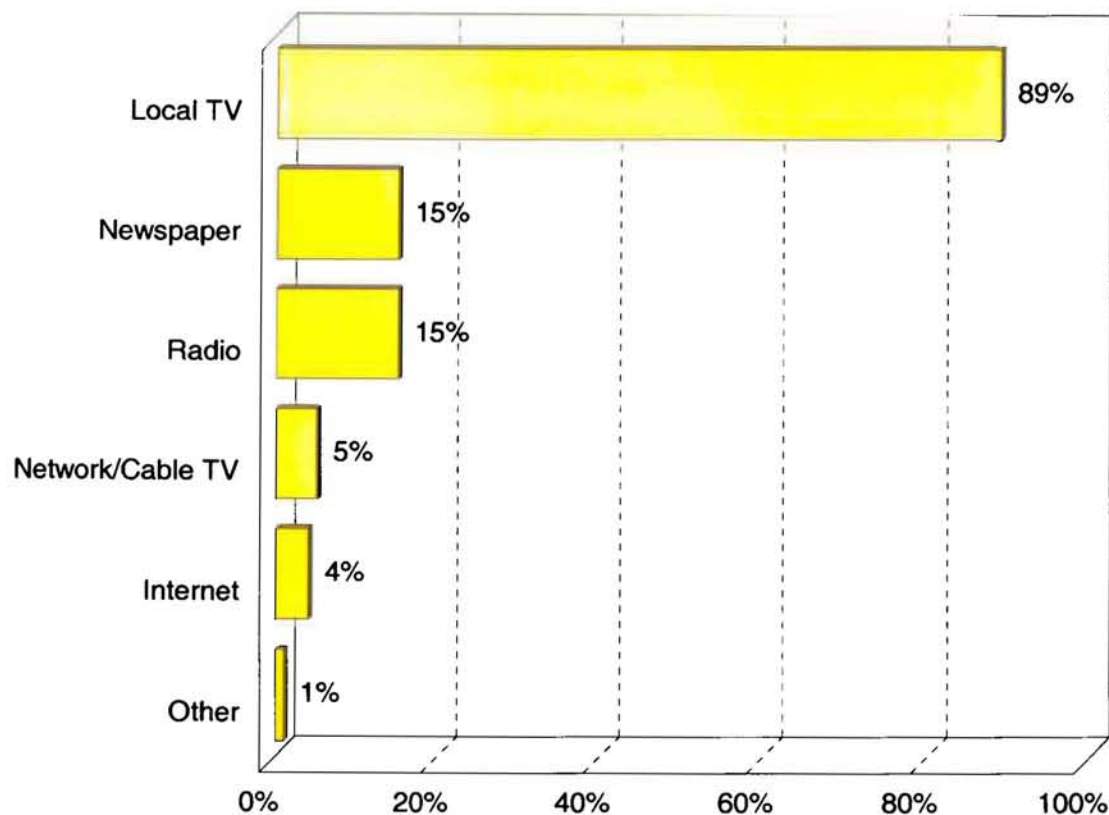


Percent of each group agreeing with each statement. ('Strongly Agree' + 'Agree')

- Respondents were also asked to Agree or Disagree with various statements regarding local programming. Although agreement with generic statements was almost identical across source types, many more over-the-air recipients agreed with those statements about their viewership of Channel 48.
- 55% of antenna users agreed that they do not watch Channel 48 due to signal problems, and 76% agreed that they would watch the station more if the signal were better.



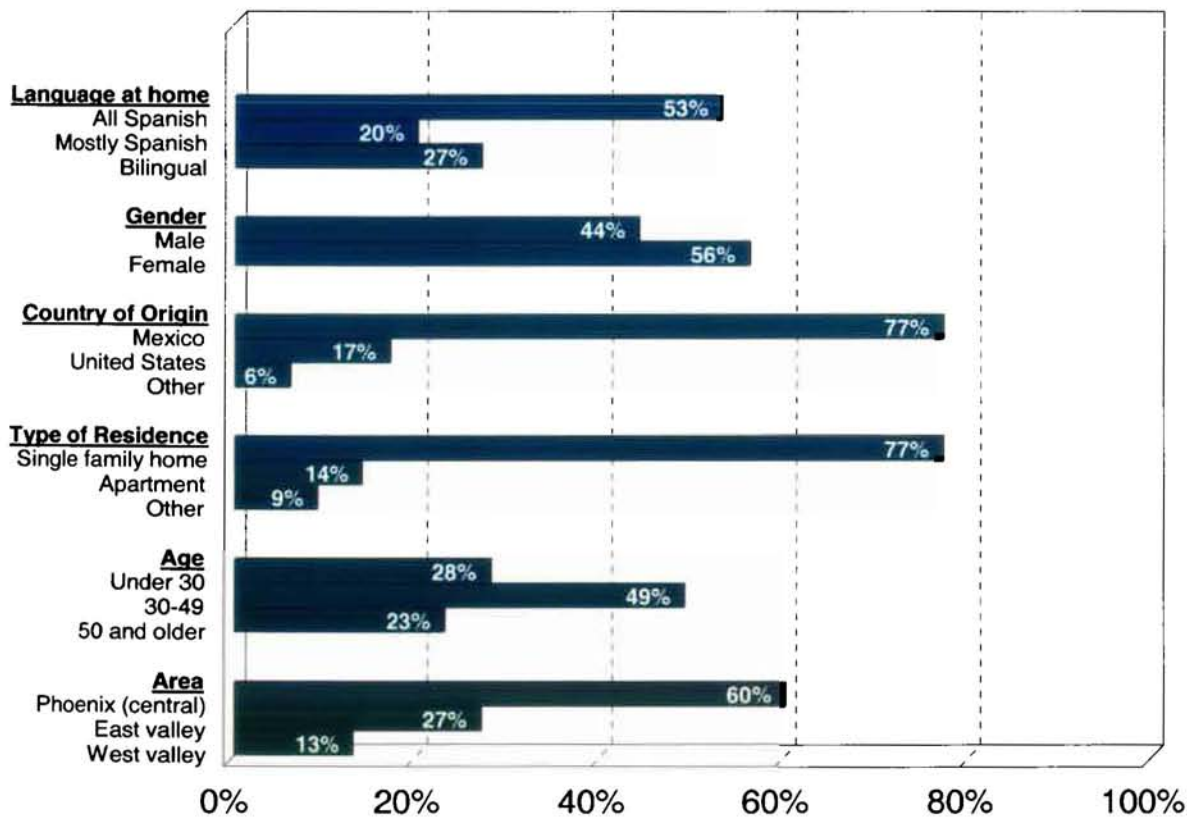
# Sources for Local News



'From what sources do you get your news on a daily basis? Any others?'  
(Multiple responses permitted)

- Local television programming is clearly the dominant source of news and information for this audience, with 89% stating they use that medium.
- 15% also reported using the newspaper and radio often, 5% stated they use network or cable TV for news, and 4% use the Internet.

# Demographics of the Sample



- The table at left provides data on a variety of demographic and other characteristics of the sample.



1. 1990年1月1日起，凡在中华人民共和国境内从事生产经营活动的纳税人，均应当依照《中华人民共和国增值税暂行条例》的规定，缴纳增值税。

2. 增值税的纳税人分为一般纳税人和小规模纳税人。一般纳税人是指年应税销售额超过规定标准的企业；小规模纳税人是指年应税销售额未达到规定标准的企业。

3. 增值税的税率分为基本税率和优惠税率。基本税率为17%，优惠税率包括13%、9%和6%等。

4. 增值税的计税方法分为直接法和间接法。直接法是指根据销售额和税率计算应纳税额；间接法是指根据购进货物和劳务的进项税额抵扣销售额的应纳税额。

5. 增值税的纳税期限分为按月、按季、按半年和按年等。纳税人应当根据税务机关的规定，按时申报和缴纳税款。

6. 增值税的征收管理实行属地原则，由纳税人所在地的主管税务机关负责征收和管理。

7. 纳税人应当依法取得增值税专用发票，并妥善保管，不得丢失。丢失增值税专用发票的，应当按照规定进行申报和处理。

8. 税务机关应当加强对增值税的征收管理，建立健全征管制度，提高征管效率，确保国家税收收入。

9. 纳税人应当自觉履行纳税义务，不得偷税、逃税、抗税。违反规定的，将依法受到处罚。

10. 本规定自发布之日起施行。

# Questionnaire

## Page 1

Hello, my name is \_\_\_\_\_, calling from WestGroup Research in Phoenix. This is not a telemarketing call, we're only interested in your opinions about different issues related to television broadcasting in the Phoenix area. The survey will only take about 5 minutes, and we would very much like to include your opinions in the study.

(PROGRAMMING: PLEASE INCLUDE RESULTS FOR ALL SCREENER QUESTIONS IN THE DATA FILE)

SCR 1: Are you 18 years of age or older? (IF NO, ASK TO SPEAK WITH ADULT 18 OR OLDER; IF NONE AVAILABLE, THANK AND TERMINATE)

SCR 2: Are you of Hispanic or Latino descent?

- (1) No → THANK AND TERMINATE
- (2) Yes → CONTINUE

SCR 3: What language do you and your family speak most at home? Would you say you speak...(READ LIST; ACCEPT ONLY ONE)

- \_\_\_ Spanish all of the time
- \_\_\_ Spanish more than English
- \_\_\_ Spanish and English equally
- \_\_\_ English more than Spanish OR, (THANK AND TERMINATE)
- \_\_\_ English all of the time (THANK AND TERMINATE)
- \_\_\_ (DO NOT READ) DK/Refused (THANK AND TERMINATE)

SCR 4: Would you prefer to complete the survey in English or Spanish? (IF SPANISH, SWITCH TO SPANISH LANGUAGE.)

1) What is your country of origin? (OPEN ENDED; DO NOT PROMPT)

- \_\_\_ Argentina
- \_\_\_ Belize
- \_\_\_ Bolivia
- \_\_\_ Brazil
- \_\_\_ Colombia
- \_\_\_ Costa Rica
- \_\_\_ Chile
- \_\_\_ Dominican Republic
- \_\_\_ Ecuador
- \_\_\_ El Salvador
- \_\_\_ French Guiana
- \_\_\_ Guatemala
- \_\_\_ Guyana
- \_\_\_ Honduras
- \_\_\_ **Mexico**
- \_\_\_ Nicaragua
- \_\_\_ Panama
- \_\_\_ Paraguay
- \_\_\_ Peru
- \_\_\_ Puerto Rico
- \_\_\_ Spain
- \_\_\_ Surinam



# Questionnaire

## Page 2

- \_\_\_ United States
- \_\_\_ Uruguay
- \_\_\_ Venezuela
- \_\_\_ Other
- \_\_\_ Do not Know, Refused, No answer

- 2) In an average week, about how many hours do you spend watching television, including weekdays and weekends? \_\_\_\_\_
- 3) What percentage of your television viewing is spent watching programming in Spanish? (RECORD BETWEEN 1% AND 100%): \_\_\_\_\_
- 4) Which of the following best describes how you receive your local television programming?
1. Cable
  2. Satellite
  3. Over the air, using an antenna
  4. Something else
  5. (DO NOT READ) Don't know/refused

(IF NOT 'OVER THE AIR', SKIP TO Q6)

- 5) (ASK ONLY IF 'OVER THE AIR' IN Q4): Do you have an outdoor or indoor antenna?

1. Outdoor
2. Indoor
3. DK/Refused

- 6) How often do you watch Channel 33, Univision?

1. Every chance you get
2. Often
3. Occasionally
4. Seldom
5. Never
6. (DK,REFUSED)

- 7) How often do you watch Channel 48, Telemundo?

1. Every chance you get
2. Often
3. Occasionally
4. Seldom
5. Never
6. (DK,REFUSED)

(IF 1 TO 3 OR 6, SKIP TO Q9)

- 8) (IF 'SELDOM' OR 'NEVER'): Why don't you watch Channel 48 more often? (OPEN-ENDED; DO NOT READ CHOICES; RECORD BELOW)

# Questionnaire

## Page 3

1. Signal too weak; can't receive that channel; other signal-related answer
2. Programming: Don't like shows, prefer other channels, etc.
3. Don't have time, don't watch much TV at all, etc.
4. Other (RECORD VERBATIM): \_\_\_\_\_

10) In your opinion, on which channel do you receive better reception?

1. Channel 33
2. Channel 48
3. Both the same
4. (DK, NO ANSWER)

11) For each of the following statements, please tell me whether you Strongly Agree, Agree, Disagree, or Strongly Disagree with that particular statement: (ROTATE)

I don't watch Channel 48 because the signal is too weak.

If the signal on Channel 48 were better, I would watch that channel more often.

Having local Spanish-language television programming is important to our community.

It's important to have more than one local Spanish-language channel, so there is more diversity and options available to us.

The following questions are for statistical purposes only:

12) From what sources do you get your news on a daily basis? Any others? (DO NOT READ LIST; CHECK ALL NAMED)

1. Local Television
2. Network/Cable Television
3. Internet
4. Radio
5. Newspaper
6. Other: \_\_\_\_\_

13) Do you currently live in a:

Single family house

Townhouse or condominium

Apartment

Duplex

Something else?

(DK, REFUSED, NO ANSWER)

14) What is the zip code where you live? \_\_\_\_\_

15) What is your age? \_\_\_\_\_

16) RECORD GENDER BY OBSERVATION: Male/Female

Those are all the questions I have, thank you very much for helping us with this survey.